

## Site Visit Strategy Tool

**Strategy:** (What information do you need and how do you intend to obtain it [i.e., persons to interview; specific questions to ask each person, including walk-around questions to check deployment]; specific documents to review and for what purpose; and observations to make? Be sure your strategy will address the overall issue, as well as the comments listed above.)

### Interviews:

Tony Joachin, HR Director

HR Staff

Hiring Managers (representative sample)

People Potential Team

Recently Hired Staff (representative sample)

Various Volunteers

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For Category 2 Lead: Strategic Planning Participants

Because this SVI covers issues of both approach and deployment, the interviews will include both senior staff (to verify the process is designed to function as described in the application) and a variety of staff impacted by the process (to check for deployment across departments, classifications).

Because the application also references the identification of skill needs during the Strategic Planning Process, we will want to have our Category 2 colleague verify this aspect during their evaluations.

### Questions to Ask:

For HR Director/Staff

1. Describe how a new or revised position description would be developed. (Expected answer would include an analysis that utilizes the four competency areas described in the application. If this is the case, then . . .)
2. What sources do you use to analyze these competency needs? (Sources noted on p. 20 of application)
3. Who is involved in conducting these analyses? (HR staff, Hiring Managers, and People Potential Team)
4. Can you give us some recent examples of position descriptions that were developed in this way? (These would then be the specific documents that would hopefully be reviewed)
5. Is this process utilized for volunteer staff as well? If not, is there a means to identify skills required by the positions filled by volunteers? How are volunteers matched to these skill needs?

For Hiring Managers

1. What are some recent positions that were filled in your department? Describe how the position descriptions for these positions were developed.
2. How does HR staff work with you to make sure they are recruiting to meet your needs?
3. Are you aware of any other settings where your skill needs are discussed?
3. How do you identify needs in your department that might be filled by volunteers?

For People Potential Team

1. Describe the PPT's composition and charge.
2. What responsibilities would you have if a new position were being proposed? Can you give us a recent example of how this role was played out?
3. What are some examples of input that you have added to these position descriptions before they were posted.
4. Have any of you recently participated in interview panels? How did the interview relate to the position description for the job to be filled?
5. What are some of the team competencies that you routinely look for? How do you determine whether or not an

applicant possesses these skills? Cultural? Service?

6. What is your role, if any, in selecting and placing volunteers?

For Recently Hired Staff (preference would be to locate staff that could produce their job descriptions and then ask about . . . )

1. Your job description lists X, Y or Z competencies for full performance. Were you asked about these in your interview?

2. How did the interview team attempt to determine if you possessed these skills?

### **Documents to Review**

- Variety of position descriptions
- Source documents for competency areas referenced
- Input/Outputs from Strategic Planning Process

### **Walking Around Questions**

1. Are the clinical/technical skill requirements for your job listed anywhere? Team? Cultural? Service?

2. Were your skills in the areas above evaluated during your hiring process?

Evidence must be sufficient to draw conclusions for the following issues:

- Does the applicant have a mature recruitment process that utilizes the analysis of four competency areas to identify needed skills?
- Are the results of these analyses reflected in position descriptions?
- Are the identified skills evaluated for during interviews?
- If the answer is yes to the above, are they equally deployed throughout the organization?
- Is the process integrated with long range planning through the Strategic Planning Process
- Does the process cover the volunteer workforce

(While the above information is not required by the Site Visit Issue Worksheet, team members may find it helpful to explicitly write this out to guide your evaluation and help determine “how much is enough?”)